



# AUSTRIA MEDIA LANDSCAPE

[www.themediavantage.com](http://www.themediavantage.com)



# Country overview

A SMALL BUT MIGHTY EUROPEAN FORCE



CAPITAL  
**Vienna**

GDP  
**\$455.7 billion**

REGION  
**Europe**

POPULATION  
**8,847,037**

GDP PER CAPITA, PPP  
**\$52,172**

AREA  
**83,871 SQ.KM**

Austria boasts one of the highest standards of living among the economies of the world, ranking highly in per capita gross domestic product.

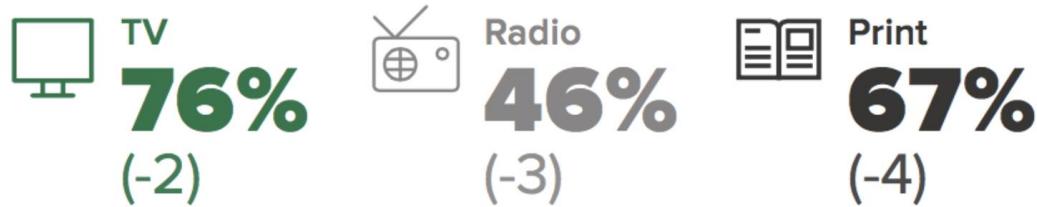
The nation's top economic sectors are services, industry and agriculture. Its economy is closely tied to its main trading partner, Germany.

Austria is a major tourist destination, helped largely by the Alps mountain range to the west and south.

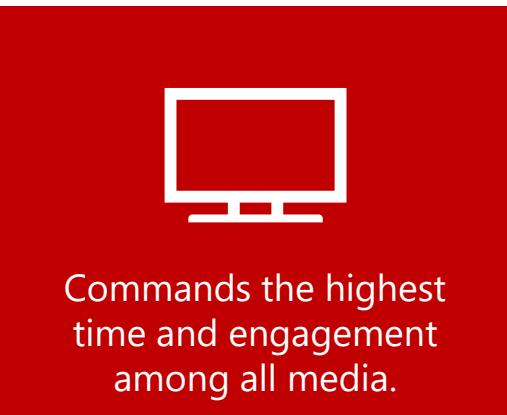
# Media consumption overview

MUCH HIGHER TRUST IN TRADITIONAL MEDIA HAS KEPT IT ALIVE AND BOOMING

## WEEKLY REACH PER SOURCE



Source: Reuters



# Time spent with media

TV TAKES THE HIGHEST SHARE OF TIME SPENT WITH MEDIA

TRADITIONAL



1 H 53 M



1 H 44 M



0 H 26 M

# TV

## THE MOST CONSUMED MEDIUM IN AUSTRIA

**Respondents who watch TV on a TV set every day or almost every day in the EU 28 countries in 2019**



76% of  
Austrians watch  
television  
everyday or  
almost  
everyday.

This average  
stands at 77%  
across 28  
European  
countries.

## BIGGEST NETWORKS

Market share of the leading TV stations (2019)

ORF2	19,8 %
ORFeins	9,1 %
ZDF	4,2 %
RTL	4,0 %
VOX	3,6 %
ATV	3,5 %
PRO7	3,4 %
PULS 4	3,4 %
SAT1	3,3 %
ARD	3,0 %
ServusTV	3,0 %
Kabel1	2,3 %
ATV//	1,1 %

## Top German Language TV Channels



ZDF



RTL



VOX



ProSieben



Sat.1



Das Erste

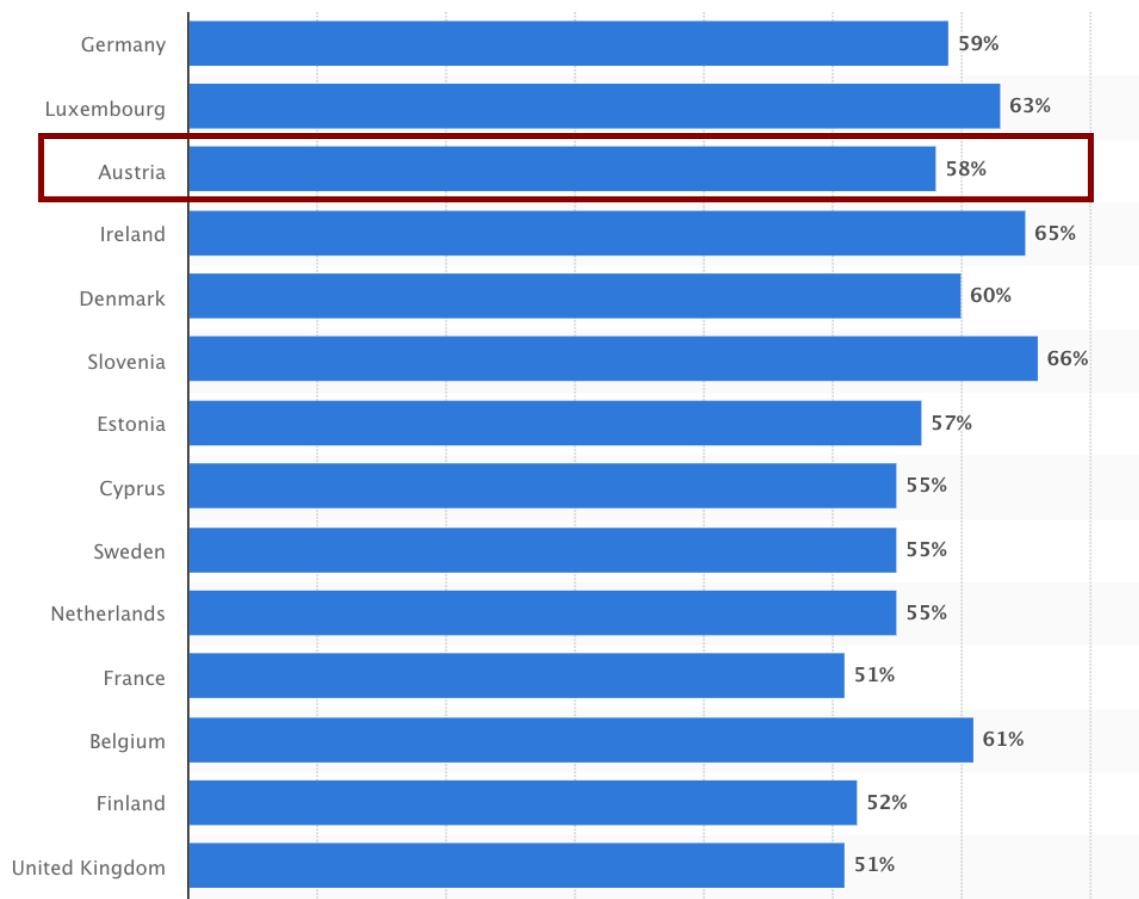


kabel eins

# Radio

ABOVE AVERAGE LISTENERSHIP ACROSS EUROPE, DRIVEN BY TRUST

**Listened to the radio every day or almost every day in  
EU 28 countries in 2019**



On average,  
Austrians listen to  
radio for 185 minutes  
everyday.

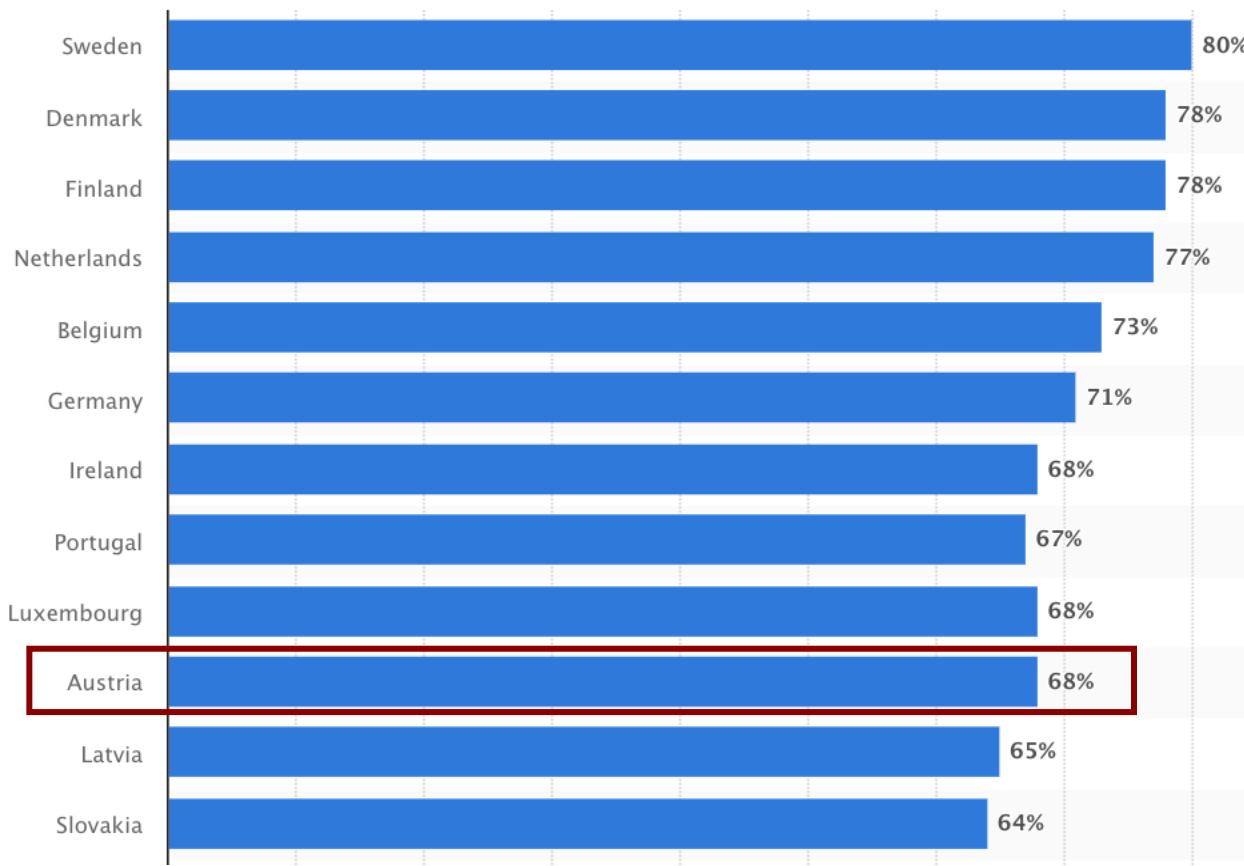
58% of Austrians  
reported to  
frequently listen  
to radio, as  
opposed to just  
47% of the EU  
average.

Online radio has  
gained a lot of  
popularity in  
Austria and is now  
listened to almost  
just as much as  
traditional radio.

# Radio

## THE MOST POPULAR NETWORKS

People that tended to trust the radio in the European Union (EU 28) countries in 2019



Trust plays a crucial role in how Austrians choose to consume their media. This is highest in radio.

68% of those surveyed trusted radio in Austria, way above the EU average of 52.

## MAJOR BROADCASTERS



ORF dominates the radio market in Austria. All major radio channels are owned by the network that reaches 4.9 m listeners everyday. Among private broadcasters, Krone hit leads the rest.

# Radio

## GERMAN LANGUAGE RADIO STATIONS



### Ö1

Österreich 1 (Ö1) is an Austrian radio station: one of the four national channels operated by Austria's public broadcaster ORF. It focuses on classical music and opera, jazz, documentaries and features, news, radio plays and dramas, Kabarett, quiz shows, and discussions.



### Hitradio Ö3

Hitradio Ö3 is one of the nationwide radio stations of Austria's public broadcaster ORF. The format focuses on contemporary hit radio, specialising pop music and chart hits from the 1980s to the present.



### FM4

FM4 is an Austrian national radio station operated by the ORF. Its main target is the youth audience, and much of the music output is characterized by an alternative rock and electronic music slant.



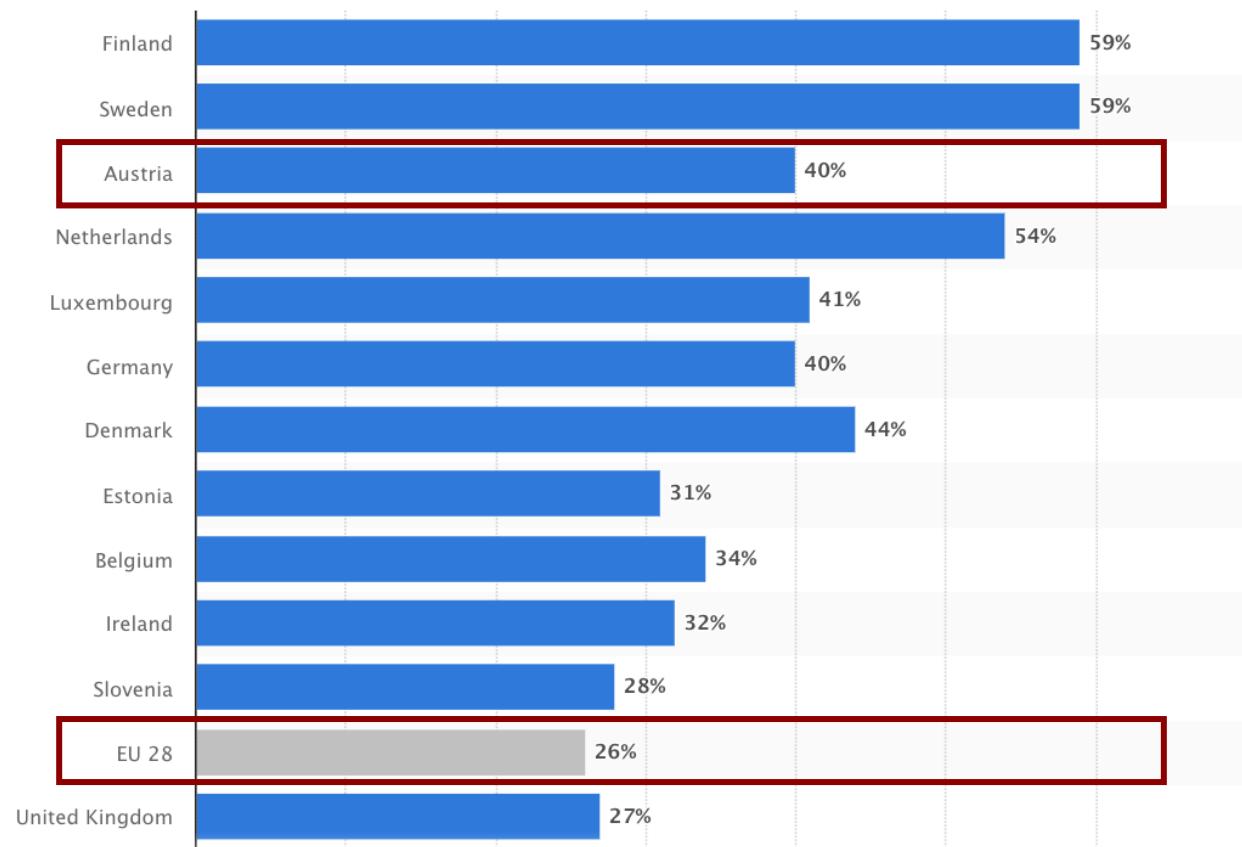
### Energy Wien

Radio Energy Wien is a private broadcaster and the subsidiary of French Radio NRJs. The Austrian broadcaster was founded in 1998. The focus of the music program is on current chart music, specializing in hot pop, RnB and house. The main target group is the city public between 25 and 39 years.

# Print

## DAILY NEWSPAPER IS A MUST FOR MANY AUSTRIANS

**People who read the written press every day or almost every day in the EU 28 countries in 2019**



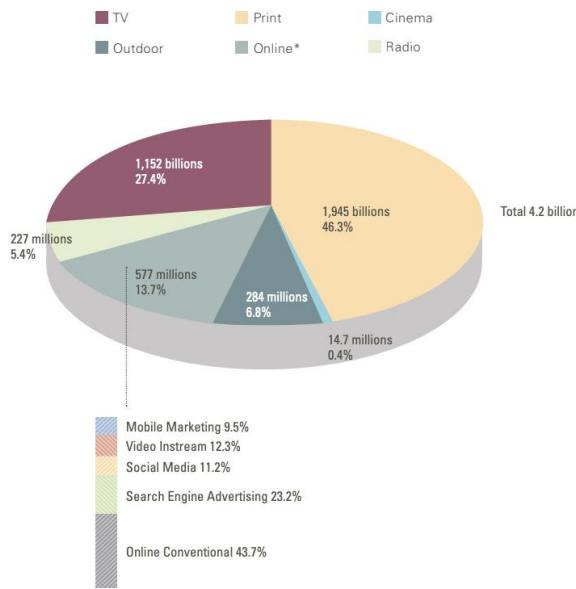
Although newspapers and magazines in Austria are no exception to the global trend of decline, circulation and reach figures are holding up incredibly well by international standards.

Part of this is attributed to the trust it commands and part to the expansion into digital.

# Print

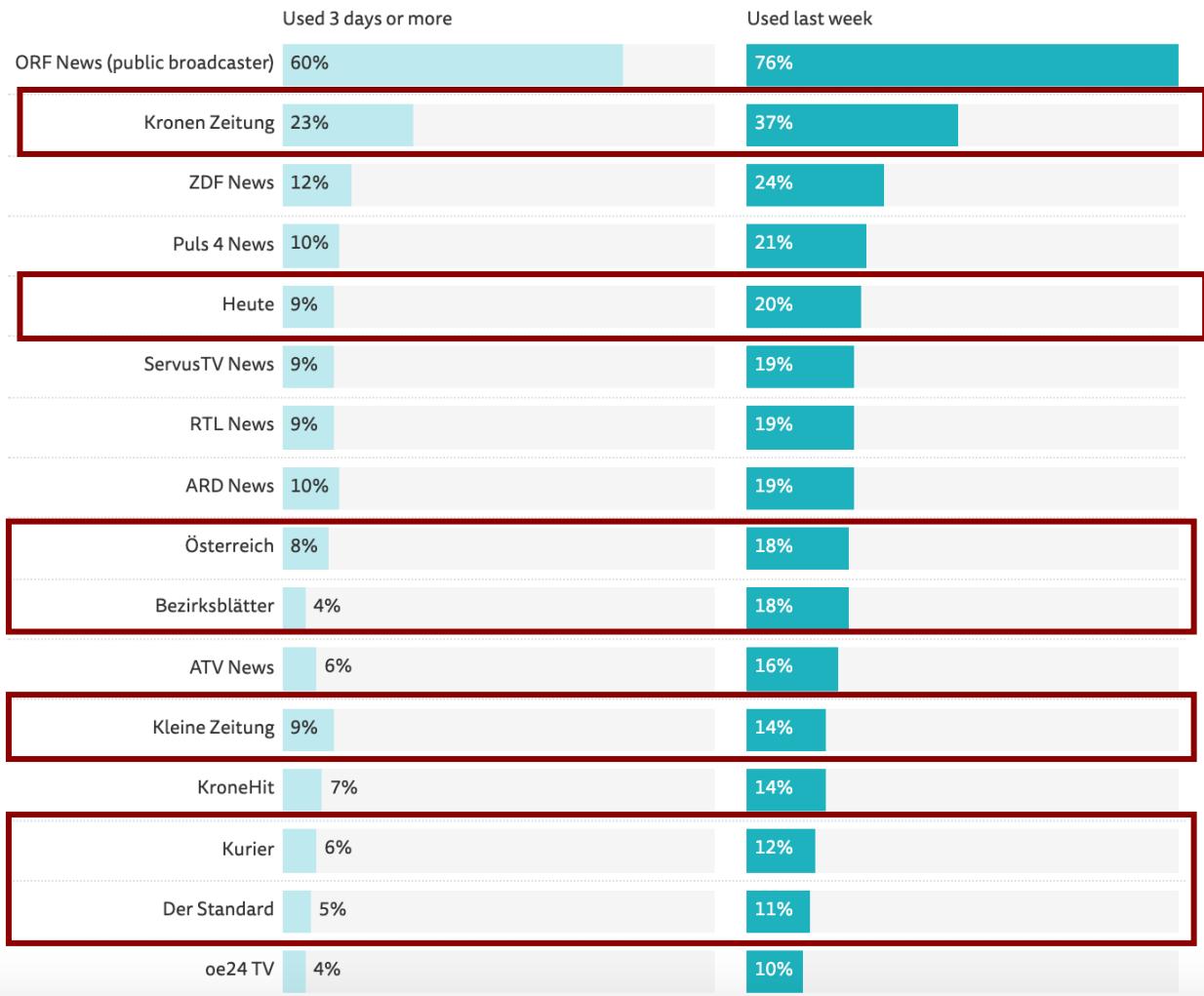
## THE IMPORTANCE OF PRINT IN THE COUNTRY DRIVES THE LARGEST SHARE OF AD SPENDS

FIGURE 13: SHARES OF GROSS ADVERTISING EXPENDITURE IN 2017, CONVENTIONAL MEDIA AND ONLINE



Share of ad revenue is highest for print

A large number of brands most used to consume news across all mediums belong to print media.



# Print

## TOP GERMAN LANGUAGE PRINT TITLES



### Kronen Zeitung Daily Circulation: 716,000

The Kronen Zeitung, commonly known as the Krone, is Austria's largest newspaper. It is known for being Eurosceptic. The newspaper organises regular campaigns and, at the same time, starts or supports referendums on issues.



### Österreich Daily Circulation: 540,000

Österreich (literally Austria) is a national Austrian daily newspaper, based in Vienna. Österreich is published in tabloid format and is described as a magazine-like paper. It is modelled on USA Today.



### Kurier Daily Circulation: 108,000

Kurier is a German-language daily newspaper based in Vienna, Austria. It combines tabloid, magazine and newspaper content and sees itself as Austria's leading quality newspaper.



### Kleine Zeitung Daily Circulation: 299,000

Kleine Zeitung is an Austrian newspaper based in Graz and Klagenfurt. As the largest regional newspaper in Austria, covering the federal states Styria and Carinthia with East Tyrol, the paper has around 800,000 readers.

# Digital overview

INTERNET PENETRATION STANDS AT 88%

JAN  
2020

## OVERVIEW OF INTERNET USE

NUMBER OF PEOPLE USING THE INTERNET, AND HOW MUCH TIME THEY SPEND USING THE INTERNET EACH DAY



AUSTRIA

TOTAL NUMBER  
OF INTERNET USERS  
ON ANY DEVICE



**7.90**  
MILLION

INTERNET USERS  
AS A PERCENTAGE OF  
TOTAL POPULATION



**88%**

ANNUAL GROWTH  
IN THE NUMBER  
OF INTERNET USERS



**+0.6%**  
**+51 THOUSAND**

AVERAGE DAILY TIME SPENT  
USING THE INTERNET ON ANY  
DEVICE BY EACH INTERNET USER



**5H 25M**

# Where can one find them on the internet

NEWS WEBSITES LIKE ORF AND KRONE ARE VERY POPULAR IN AUSTRIA

JAN 2020 MOST-VISITED WEBSITES (SIMILARWEB)					
RANKING OF TOP WEBSITES BY AVERAGE MONTHLY TRAFFIC ACCORDING TO SIMILARWEB					
#	WEBSITE	CATEGORY	MONTHLY TRAFFIC	TIME PER VISIT	PAGES PER VISIT
01	GOOGLE.COM	SEARCH	288,500,000	9M 59S	7.8
02	YOUTUBE.COM	STREAMING VIDEO	99,900,000	23M 24S	9.3
03	FACEBOOK.COM	SOCIAL	74,860,000	10M 10S	9.3
04	GOOGLE.AT	SEARCH	47,480,000	8M 13S	9.5
05	ORF.AT	NEWS & MEDIA	43,950,000	5M 42S	5.2
06	AMAZON.DE	E-COMMERCE	41,280,000	7M 21S	we are. social 10.9
07	WIKIPEDIA.ORG	REFERENCE	35,460,000	3M 50S	3.0
08	KRONE.AT	NEWS & MEDIA	22,730,000	4M 22S	3.7
09	PORNHUB.COM	ADULT	19,690,000	8M 32S	7.9
10	WILLHABEN.AT	CLASSIFIEDS	18,040,000	10M 11S	14.9

# Social media

50% OF THE TOTAL POPULATION USES SOCIAL MEDIA

JAN  
2020

## SOCIAL MEDIA OVERVIEW

BASED ON THE REPORTED POTENTIAL ADVERTISING REACH OF SELECTED SOCIAL MEDIA PLATFORMS



AUSTRIA

TOTAL NUMBER  
OF ACTIVE SOCIAL  
MEDIA USERS



**4.50**  
MILLION

SOCIAL MEDIA USERS  
COMPARED TO  
TOTAL POPULATION



global  
web  
index

**50%**

CHANGE IN SOCIAL  
MEDIA USER NUMBERS  
(APR 2019 TO JAN 2020)



global  
web  
index

**+5.4%**  
**+229 THOUSAND**

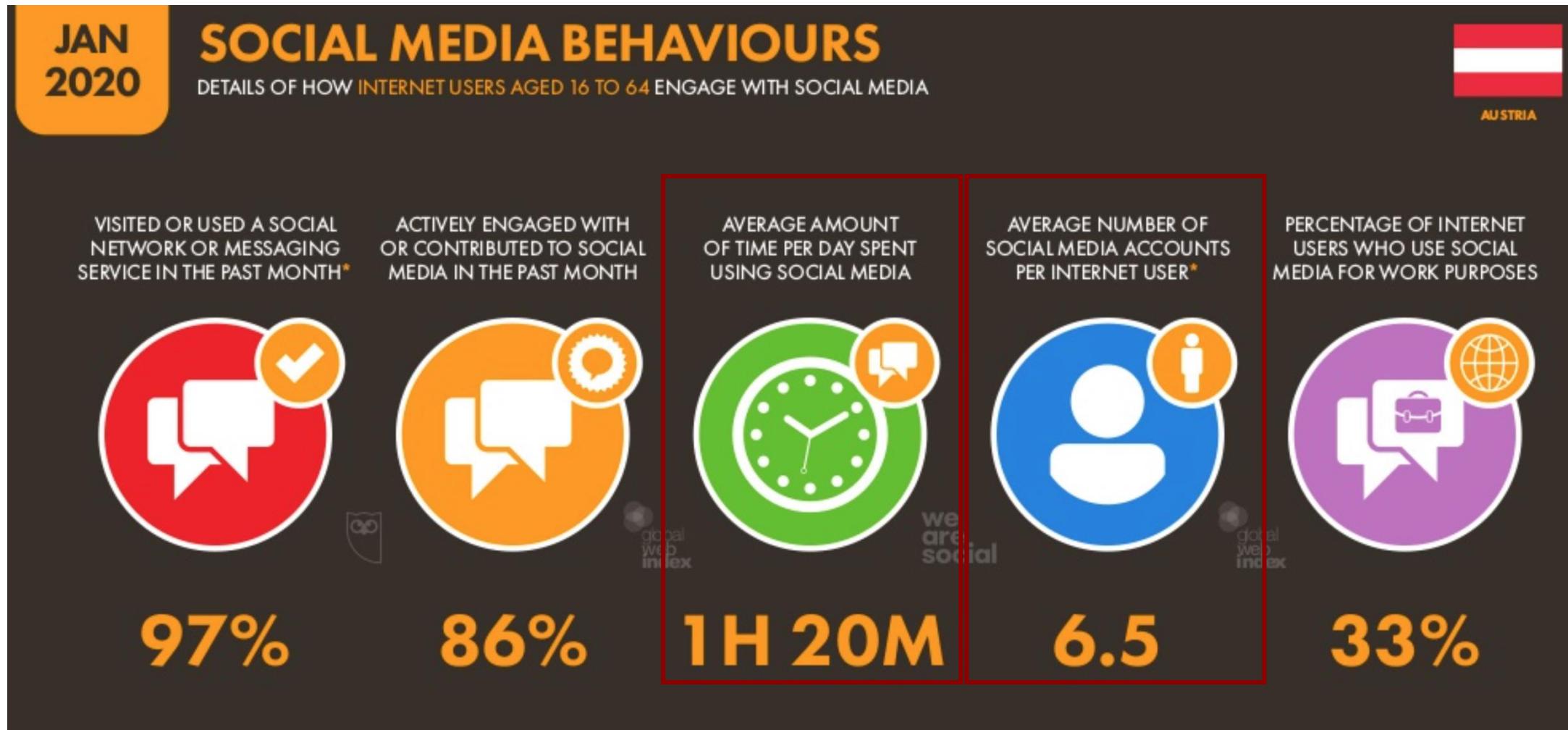
PERCENTAGE OF ACTIVE  
SOCIAL MEDIA USERS  
ACCESSING VIA MOBILE



**97%**

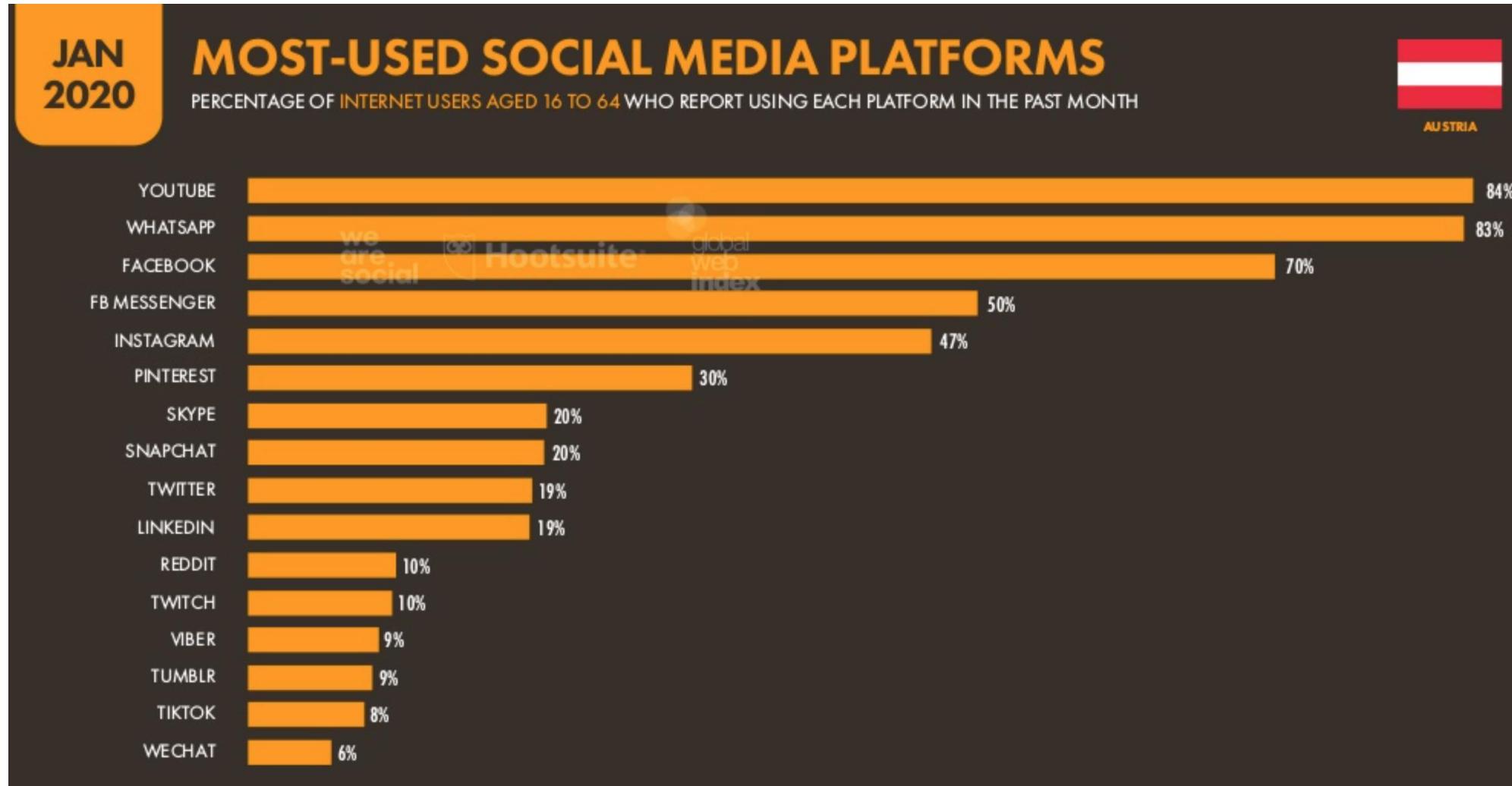
# Social media

THEY SPEND 1 HOUR AND 20 MINUTES USING SOCIAL MEDIA DAILY



# Social media audiences

LARGEST SOCIAL MEDIA ADVERTISING AUDIENCE CAN BE FOUND ON YOUTUBE



# Let's discuss

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